Millogic Documentation

homepage: www.millogic.nl
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Store UBO information

The module Relation management is incorporated in the Relations screen. In the Relation management tab a custom made database can be maintained with 35 files.
The layout of these files can be supplied as custom made.
Users can define files and fields as wished via *Supervisor menu > Relation management settings.*
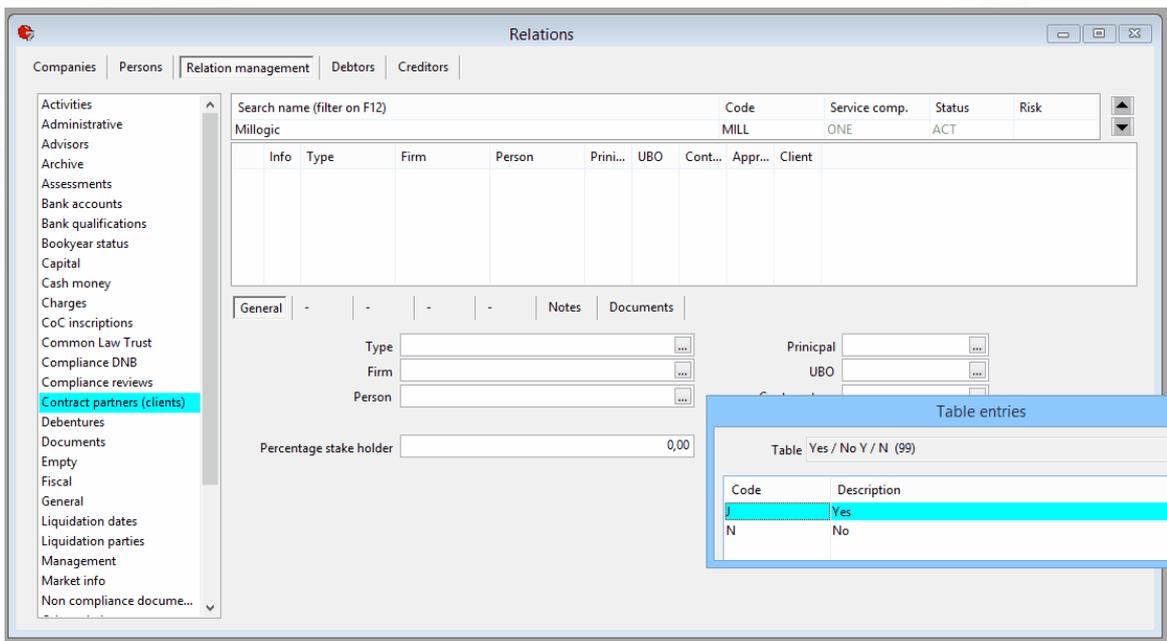
Default file 136 is meant for contact information like UBOs.
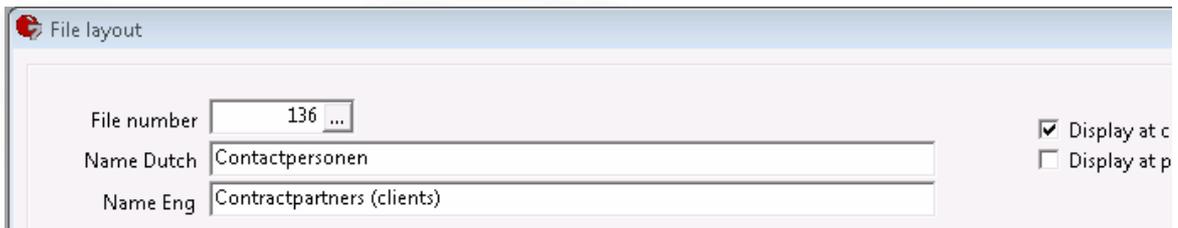
The data in this file can be managed in the Relation Management module.

For example see the screen below.
In this screen the UBO field (file 136 field 10) is a Y/N marker.

User rights

To make sure that only authorized users are able to view and change this information it is possible to set restrictions on the rights per file.
Users with no rights for file 136 are not able to see data on the screen or in related reports.
Rights can be set separately for read, write and delete.
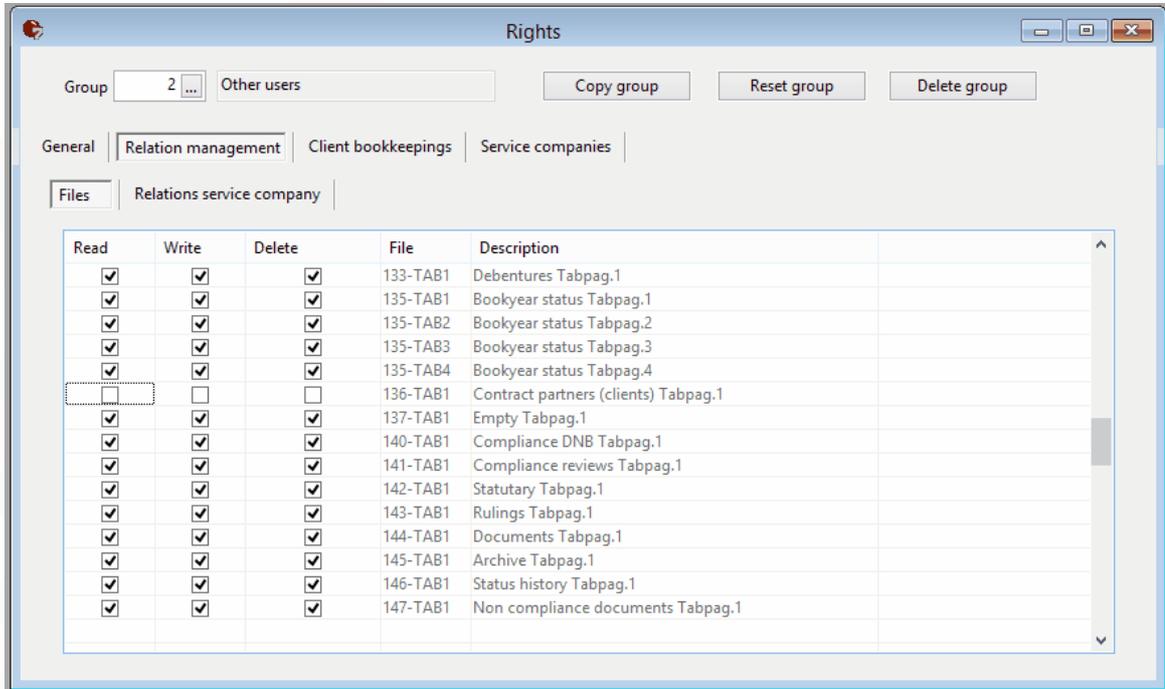
When users have no rights for file 136 this data is not visible on the Relations tabs of Companies and Persons.
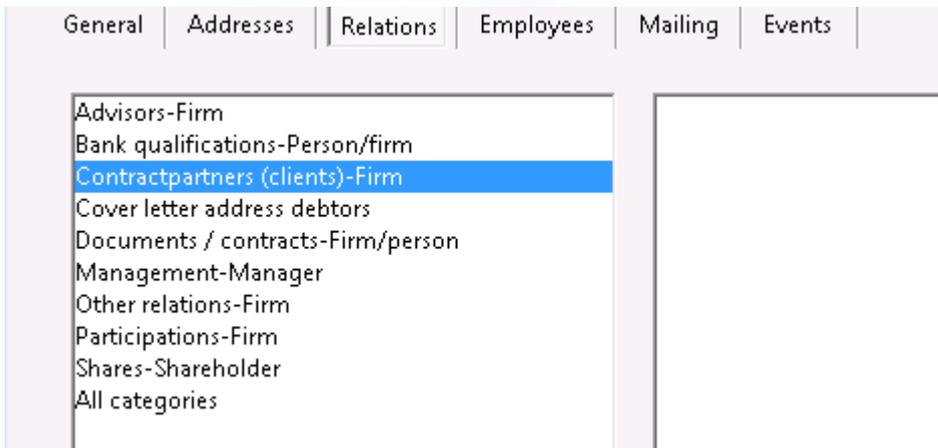
Note: Because it is not possible to set rights on a particular types of companies or persons we advise not to use a company type or person type called UBO.

Note: Millogic developed a special wizard to enter UBO data and documents.

Encryption of data

In the Trust version it is possible to encrypt certain persons and companies in the Service Companies.

For example when it is not desired that all users can see the address information of these relations, like a UBO for instance.
In the Settings an option "Encrypt address information relations" can be set on the Trust tab.

When the option is set, a Lock button   appears in the tab page general of Companies and Persons.

By pressing the Lock button the address information found by the Company or Person will be moved and encrypted to another part of the database. The normal address fields will be emptied and grayed out.
When a relation must be unrecognizable to users who do not have access, the name of the relation also can be entered in the encrypted field Name.
In the normal name and search name fields, you can fill in the relation code instead of the real name. This has to be done manually.

When the button is colored red the data is already encrypted. By pressing the button the data can be maintained.

To prevent entering a contact twice you can search existing contacts by name with CTRL+F.

The encrypted fields are not supported by any functionality in Mill7 regarding addresses like mailing etc.
For the moment there are only two reports (EU scan Companies and EU scan Persons) where encrypted information is shown. These reports are restricted to users with all rights for the file and for access to encrypted address information.

Users must have the right "Access to encrypted address information" to see and use the lock button.
This right can be set on the General rights tab (Relations type) .